

Tap into the talent of your team by making PDRs inclusive

Social Inclusion



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Setting the scene

- PDR aims to maintain and improve employees' contributions in line with our goals and values. **It is important that every employee has the opportunity to discuss their achievements over the past 12 months and to set objectives for the next year. It is your responsibility to clear time in your schedule to facilitate these conversations.**
- Inclusive PDR is simply ensuring that we assess performance and develop talent without bias.
- It is important to bear in mind that some members of our teams may need flexibility and adjustments to ensure that the process is fair and facilitates a constructive conversation.
- A good place to start is to consult any inclusion passports. This should provide some helpful information that will guide you in any adjustments that may be required for the review meeting.
- Your conversation should include a **reflection** on the past 12 months and setting **objectives** for next year.

Some key pointers:

- Avoid surprises – Managers should discuss and address any problems or issues as they arise and not leave concerns until the end of year PDR meeting.
- Objective criteria should be used where possible to reduce the risk of managers being seen to favour certain employees over others. Example criteria include:
 - Achievements against pre-defined objectives.
 - Quality of work produced (e.g. Error free? On time?).
 - Demonstration of subject knowledge.
 - Evidence of continued professional development.
 - How the team member has supported strategic or team goals and objectives.

This will help to reduce any bias in judgments or decision making.

Be aware of potential for discrimination – Managers should actively consider the diversity of their workforce and ensure that their arrangements are **fair to all** and in line with the Equality Act.

For example:

- A manager must make reasonable adjustments if an employee with a disability is disadvantaged by their performance measures.
- Be mindful of flexible working arrangements and ensure expectations and objectives are appropriate.
- Consider religious adjustments. Some colleagues pray frequently, or request time off for faith celebration; this should not impact assessment of performance in their role.
- If an employee identifies barriers, they are facing during the review consider following the adjustments process to identify how these can be addressed.

Preparing for the Conversation

- Managers should check their own bias and ensure they are not stereotyping anyone's performance or letting their expectations, favourable or unfavourable, influence their judgement. You can mitigate bias by:
 - Having a standard set of criteria for every team member.
 - Seeking feedback from a variety of stakeholders.
 - Regular one to ones can eliminate the chance of bias impacting a fair assessment.
 - Being aware of the different biases which impact decision-making can also be helpful. These include:
 - Affinity bias** - a tendency to look more favourably towards those team members who are similar to us or with whom we share things in common.
 - Confirmation bias** – seeking only evidence and feedback that confirms our perceptions.
 - Halo bias** – assuming someone has only positive traits due to one strength e.g. Your team member is always early, you value punctuality so use this trait only to assess them as a great team member.
 - Horns bias** – assuming someone has only negative traits due to one weakness e.g. Your team member is always late, you hate tardiness so conclude they have been underperforming.
 - Stereotype bias** – relying on a stereotype to make decisions – e.g. part time workers aren't committed to their job.
 - Contrast bias** – using a different team member as a benchmark rather than focussing on the individual's performance against their own objectives. E.g. Employee A is great at presenting, but Employee B isn't as good; therefore Employee B has performed less well, even if presenting isn't part of their objectives.
 - Recency Bias** – judging performance on recent delivery rather than evaluating the whole year.

If bias is not checked it could limit career planning and development opportunities for certain people.

- Managers should discuss learning opportunities and future aspirations with all employees and avoid making assumptions about who may or may not be interested or capable.
- Mentoring and coaching are important mechanisms used to support people's development. Familiarise yourself with mentoring programmes such as Connectr and Whitehall Industry Group Mentoring and talent development programmes for under-represented groups such as INspire, EmpowerHer and others
- **Raise aspirations** by building confidence and self-esteem. Focus on what has been delivered well and where you have witnessed the employee's strengths.
- Ensure any feedback for improvement is **specific and measurable**. Set clear objectives for improvement and avoid using others in the team as a benchmark.

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Setting Social Inclusion Objectives

Social Inclusion is a key pillar of our strategy and to help deliver our strategy we encourage everyone to have a social inclusion objective.

To set your objective, or to help team members set theirs, it helps some people to think about areas where groups or individuals are not thriving, succeeding, or represented in your area of work. You may know this from individual disclosures of discontent, staff and student survey results or not being able to attract and retain a diverse team or groups in your team or teams. Alternatively, you may have seen some good practice that you would like to implement in your area, or there may be a gap in your knowledge or skills that you would like address. Once you have identified an area where inclusion input is required, you can think about what you would like to achieve.

Some examples may include:

Getting confident and comfortable discussing diversity and inclusion

If someone needs to increase their knowledge and confidence it might be helpful to take the following actions:

- [Join a network, departmental or faculty forum.](#)
- [Ensure you have completed all GoodCourse Modules.](#)
- [Attend an event.](#)
- [Check out these resources.](#)
- [Join the mutual mentoring programme.](#)
- [Join WIHEA learning circles.](#)

Addressing unacceptable behaviours

There have been some incidents where a person or people have felt discriminated against, bullied or harassed. You want to increase understanding of unacceptable behaviours and empower people to challenge. You could consider the following actions:

- Invite the Report + Support Team to come and talk to the team.
- Ensure that team members complete the relevant GoodCourse Modules and then facilitate a discussion with the team.
- [Invite the Social Inclusion Strategy team to come and facilitate a discussion with the team.](#)

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Increasing diversity in your recruitment

If you have access to the staff dashboards you can look at what the data is telling you about your current profile, who is applying for your jobs and being shortlisted. You could consider the following actions to help you to develop an action plan:

- You could invite a member of the Social Inclusion Strategy team to work with you along with your HRBP.
- Consult the Inclusive Recruitment Guide for ideas on how you can be more inclusive in your process.

Promoting inclusive cultures

If your employee engagement scores, or any other data or evidence is telling you that staff or students are not feeling like they belong, welcomed, or included then you might want to think about how you identify what is causing them to have this experience. You could consider the following actions:

- Look at your data to understand better what the key issues are.
- Invite a member of the Social Inclusion Strategy team to work with you to identify issues and possible interventions.

Pay Gaps

If you have a significant gender, race, disability or LGBTUIA pay gap and you want to understand what is causing it:

- You could raise this at your faculty or departmental inclusion forum to find out what actions other groups are taking.
- Consult the following action plans:
 - Departmental or Institutional Athena Swan.
 - Institutional race action plan.
 - Pay gap report.
- Work with HR and Social Inclusion Strategy teams.

Awarding Gaps

You have significant awarding gaps, and you want to understand what is causing them and the action you could take to address the issues:

- Consult the departmental action plan for planned interventions.
- Work with Inclusive Education and Social Inclusion Strategy Teams for more information for established interventions and actions and support with next steps.
- Take part in WIHEA workshops for further information and guidance.

Adjustments

You have several staff and students requesting reasonable adjustments and want to understand how you can support them:

- Review the resources and guidance available on the Social Inclusion Pages in particular the inclusion passports and guidance.
- Work with HR to ensure you are following the correct process.
- Speak to the Wellbeing team to support students.
- Work with the Social Inclusion Strategy Team to understand the potential barriers faced by staff and students and how we can support them.

